

State of California
Mobility Action Plan for Improving Human Services Transportation
Through Effective Statewide Coordination

INTRODUCTION

The Executive Order on Human Services Transportation Coordination signed by President Bush in February 2004 called for better coordination of federal human services transportation programs to simplify access, reduce duplication, and enhance cost efficiencies within existing resources.

The Coordinating Council on Access & Mobility was established pursuant to the President's Executive Order made up of eleven federal departments working together with the states to achieve the coordination goals of the Executive Order.

The United We Ride Grant Program was established and administered by the Federal Transit Administration (FTA) to provide funds and technical assistance to facilitate coordination efforts in all states.

The Department of Transportation (Department), Division of Mass Transportation, received a United We Ride grant and convened a Mobility Summit on March 7, 2005, to provide a comprehensive discussion of the state of coordination in California. The recommendation of the Mobility Summit participants was to establish a formal structure in California to address mobility and coordination barriers and implement mobility management at the state, regional, and local levels.

A number of coordination and mobility management functions are being performed in some regions of the state by Consolidated Transportation Service Agencies (CTSAs), which were established by AB 120 (Statutes of 1979), the Social Service Transportation Improvement Act. CTSAs exist in some regions of the state, but not others, and are functioning at varying levels of effectiveness.

As a result of SB 910 (Statutes of 1999), the state established a Long Range Strategic Plan for an Aging California Population (LRSPA). The LRSPA cites mobility to be critical to the well-being of California's elderly and contains numerous transportation recommendations, including conducting the Mobility Summit funded by the United We Ride grant.

The Olmstead Advisory Committee was established by the Health & Human Services Agency (HHS) to facilitate de-institutionalization of persons with disabilities, and recognizes that transportation is a critical component of that effort.

At the Autumn 2005 California Association for Coordinated Transportation (CalACT) Conference, the United We Ride Framework for Action Self Assessment Tool for states was performed by a variety of state, regional, local transportation, and human services providers, which determined the state needs to begin formal coordination efforts.

An additional United We Ride Framework for Action meeting entitled "Human Services Transportation Coordination Session" was held on November 17, 2005, in Sacramento. The outcome of the overall State Government Self-Assessment concluded that the state "needs to begin" improving human services transportation coordination. Meeting participants included representatives from the following State of California Departments: Department of Transportation, Social Services, Developmental Services, Veterans Affairs, Rehabilitation, and Aging. Staff from the Federal Transit Administration and Health & Human Services Agency also participated.

In November 2005, the Department of Transportation's Division of Mass Transportation applied for a second United We Ride coordination grant to implement the goals, action steps, and deliverables contained in the final version of this *State of California Mobility Action Plan for Improving Human Services Transportation Through Effective Statewide Coordination, which is based upon the United We Ride Framework for Action Self-Assessment Tool for States for building the fully coordinated transportation system.*

GOALS, ACTIONS & DELIVERABLES FOR IMPROVING HUMAN SERVICES TRANSPORTATION COORDINATION

GOAL 1

The Health & Human Services Agency (HHS), the Business, Transportation & Housing Agency (BTH), and other state leaders, will make human services transportation coordination improvement a priority, through the establishment of an interagency body that will set clear direction for improving human services transportation within the state.

ACTION STEPS

1. Caltrans shall draft an MOU to facilitate the HHS and BTH agencies' commitment to work together and share responsibility for making human services transportation more efficient, cost effective, and more accessible for all citizens.
2. Human services and transportation departments shall actively participate to take shared action to increase coordination of human services transportation.

DELIVERABLES

1. Memorandums of Understanding (MOU) and cooperative agreements between HHS, BTH, and partner agencies in labor and education, shall be developed to provide clear objectives, roles and responsibilities that address the various needs for human services transportation coordination. The MOU shall include the following:
 - Steps for increased coordination of duplicative programs.
 - Steps to resolve conflicting state and federal requirements and regulations, and promoting better use of local, state and federal resources.
 - Staff or a lead agency assigned day-to-day responsibilities for collecting data, sharing information, and coordinating activities among the various agencies.
 - Interagency collaboration to ensure that policy and funding strategies are coordinated.
2. Comprehensive Human Services Transportation Funding Matrix
 - Coordination efforts shall be greatly enhanced by creating a comprehensive funding matrix outlining each program in each agency that supports some aspect of human services transportation. The matrix shall include the level of funding, type of support, eligibility, match requirement, dissemination process, reporting requirements, and other related information.
 - Annually, the state agencies shall review and revise the chart to identify strategies to ensure coordination of these programs and human services transportation at the local level.

GOAL 2

To address restrictive and duplicative laws, regulations, and programs related to human services transportation-funding programs.

ACTION STEPS

1. Identify duplication and conflicts among statutes and regulations funding programs.
2. Identify potential statutory, institutional, and administrative solutions.
3. Develop priorities for coordinating human services transportation and a strategic plan for achieving them through open and informed discussions among various stakeholders from urban and rural areas. These will include local government officials, human services transportation agencies, transportation providers (public, private nonprofit, for-profits and volunteers), employers, and customer representatives.
4. Identify human services transportation barriers and gaps, and develop strategies to address them through a waiver-demonstration program (pilot).

DELIVERABLES

1. A clear mission and Strategic Implementation Plan guided by local, regional, state, and federal stakeholders' input to address how transportation funding programs can be coordinated.

2. Application/proposal to the FTA for waiver-demonstration pilot program that implements innovative strategies that remove identified funding barriers and gaps.

GOAL 3

To ensure continuity in improving human services transportation coordination.

ACTION STEPS

1. Data shall be collected on the benefits of coordination and benchmarks shall be established.
 - Measuring the benefits of coordination is necessary for making continuous improvements in human services transportation delivery, as well as for generating support for further efforts.
 - Each agency shall track the number of passenger trips provided, the type of human services transportation they receive, and the fully allocated costs associated with those human services transportation.
 - A central database shall be established for all of this information, which shall be reviewed annually with all of the agencies in order to set benchmarks for future progress.
 - Equally important is gathering information, and measuring the outcomes and benefits therein, on the economic and quality of life benefits of connecting people to jobs, health care, education, nutrition, and social support networks.
2. Customer and agency ideas and concerns shall be gathered for each step of the coordination process, and customer satisfaction data shall be collected.
 - State/federal agencies shall actively engage consumers and their advocates as part of the planning, design, and implementation stages of coordination.
 - Consumers shall serve on an advisory group to the interagency body.
 - A state website and a special toll-free telephone number shall be established, and citizens will be encouraged to discuss their human services transportation needs, register complaints or give compliments, and offer suggestions on improving human services transportation.
3. Efforts shall be made to inform the transportation users about available programs and services.
 - All agencies involved with human services transportation shall disseminate information through their respective networks and programs.
 - A key resource shall be a shared Transportation Coordination website that includes publications, links to relevant information, policies, and programs.
4. The benefits of coordination shall be communicated to key stakeholders.

- The initiative shall also be supported by ongoing marketing and communications efforts that consist of media outreach, public service announcements, advertising, direct mail to target groups or other means.
5. There shall be a mechanism for coordinating funding for cost effective human services transportation delivery.
- When possible, state agencies shall create coordinated funding strategies at the state level to ease coordination issues at the local level.
 - When that is not feasible, state agencies responsible for allocating funds for human services transportation shall encourage grantees at the community level to coordinate their resources with others, such as human services transportation agencies, to provide funding for both capital and operating needs.
6. Local funding allocations will be based on demonstrated evidence of coordinated activities.
- Projects selected shall be consistent with a locally developed, coordinated public transit-human services transportation plan as required by SAFETEA-LU.
 - Each state agency is responsible for assuring transportation funding allocations are consistent with local coordination plans.
 - The locally-developed plans shall be used to allocate funding in ways that provide increased coordination.
7. There shall be consistent cost reporting procedures across programs and agencies. Human services transportation expenditures shall be isolated from other program expenditures and easily identified.
- Working cooperatively, different agencies dealing with human services transportation shall agree on proven best practices of common measurements, definitions for tracking, and reporting the costs, effectiveness, and impact of human services transportation.
 - Individual funding mechanisms shall be tracked, using common definitions, which eliminate the need to collect different measurements for different agencies.
 - Each agency shall have a specific budgetary line item that can be tracked for any expenses related to human services transportation.
8. There shall be a method for defining allocated transportation costs across programs and agencies.
- The Department and other agencies that provide transportation resources shall agree on a fair and equitable division of funding responsibilities for human services transportation at the community level.
 - Each agency contributes the appropriate payment for the fully allocated transportation costs to provide human services transportation to its target populations.

9. The state shall assess transportation technology needs in communities across the state, and encourage technology development at the local level.
 - The state shall survey communities about their technology resources and needs for improving scheduling, dispatching, reservations, billing, and reporting.
 - Local transportation providers shall be invited to state meetings for statewide or regional technology system planning.
 - Communities shall participate in ongoing statewide discussions between systems using technology for coordinated transportation through list-serves, face-to-face forums, and other means.
 - State-funded technical assistance and peer-to-peer programs shall be available to local transportation providers.
 - The state shall investigate ways, such as pooled acquisition, to help communities acquire human services transportation technology.
10. The state shall develop protocols for data management across state agencies to facilitate its use by local systems.
 - Protocols shall be implemented and followed by different agencies for managing information about clients, trips, costs, and other key areas that the coordination process has identified.
 - These protocols shall maximize the sharing of relevant data while protecting confidentiality.
11. Local agencies shall verify human services transportation eligibility for individual consumers in "real time."
 - Providers who have been assigned a "pass code" shall be able to log onto an internet website, enter a client identification number, and determine eligibility for specific program areas, such as Medicaid, aging, rehabilitation services, and Welfare to Work.
12. Billing and payment systems shall be designed so that a payment card can be used and trips allocated among various funding sources, and all state-funded transportation programs shall be able to access the system.
 - An electronic benefits card shall allow clients of human services transportation agencies to present a single payment for each trip, regardless of which agency sponsors the trip.
 - The provider shall then submit the client record for number and costs of trips, and is reimbursed by the appropriate agency.
 - While this card shall be able to be obtained through any of the state programs, each program shall be able to add a client to the system, as he or she becomes eligible.
13. The state shall take actions to establish and support mobility management at the community level.

- Working through state universities, colleges, and transportation networks, the state shall provide training and technical assistance for mobility management initiatives such as transportation brokerage or programs to teach targeted consumer groups such as older persons and those with disabilities how to access or ride various human services transportation modes.

DELIVERABLES

1. Information technologies (IT), data systems and tools to manage human services transportation coordination of ridership data, funding, automated billing, and performance reporting.
2. System wide infrastructure to support IT data systems and tools, including linkages between the various existing IT systems.

GOAL 4

Establish an entity charged with a clearly articulated mission that is sufficiently long range, comprehensive, and improves human services transportation coordination throughout the state.

ACTION STEPS

1. At the March 7, 2005 Mobility Summit, it was recommended that a California Mobility Council and Mobility Task Force be established. BTH and HHS shall collaborate in obtaining a Governor's Executive Order for the establishment of the California Mobility Council and the Mobility Task Force.
2. Once established, the California Mobility Council shall maintain an active communications strategy on the benefits of transportation coordination. Key components of the strategy shall be speeches and presentations made by senior officials that highlight the economic and mobility benefits gained through transportation.
3. The California Mobility Council shall use the ongoing assessment process to guide the development of a strategic plan with tangible goals and objectives, timelines, and methods for measuring performance and evaluating outcomes. Priorities and strategies embodied in this plan shall be cross-referenced and supported by the State Transportation Improvement Program and other relevant plans and programs.
4. In support of the California Mobility Council, the Mobility Task Force shall regularly consult with local-level stakeholders in different parts of the state through forums, advisory boards, summits or similar means.
 - Members of the Mobility Task Force shall communicate regularly with various agencies, including the FTA, the Department of Labor, the Department of Housing and Urban Development, the Department of Education, and various agencies within HHS.

- Representatives shall meet in Washington D.C. and at the regional level to discuss coordination barriers and ways to surmount them, share successes, and develop joint state and federal strategies.

DELIVERABLES

1. An Issue Memo (Governor's Action Request) to BTH and HHS Secretaries requesting support for a Governor's Executive Order for the establishment of a California Mobility Council and Mobility Task Force.
2. If approved, there will be an Executive Order signed by the Governor instituting the California Mobility Council and Mobility Task Force.